



MEETING MINUTES

State of Louisiana ERP Project

LA-SC-002

Blueprint Workshop / Linear Assets: WO Creation & Management

1 Day; 10/15/2008 @ 08:30 to 4:30

Location: N-214 & N-215, DOTD HQ Annex Building

Attendees:

No.	Name	Invited?	Attended?	Comments
1.	Mark Suarez	Y	Y	ERP
2.	Boyd Barbier	Y	Y	ERP
3.	Lori Humm	Y	Y	DOTD
4.	Charles Pilson	Y	Y	ERP
5.	Shanker Shrestha	Y	Y	ERP
6.	Deirdre Hill	Y	Y	DOTD
7.	Mike Moss	Y	Y	DOTD
8.	Chad Vosberg	Y	Y	DOTD
9.	Michael Cannon	Y	Y	DOTD
10.	James White	Y	Y	DOTD
11.	Deana Sowards	Y	N	DOTD
12.	Buzzy Wegener	Y	Y	DOTD
13.	Darrell Goza	Y	Y	DOTD
14.	Gene Caldwell	Y	N	DOTD
15.	Jill Skinner	Y	N	DOTD
16.	John Sanders	Y	N	DOTD
17.	Kirk Gallien	Y	N	DOTD
18.	Teresa Scivicque	Y	N	DOTD
19.	Thomas Hale	Y	N	DOTD
20.	Connie Standige	Y	N	DOTD
21.	Frank Standige	Y	N	DOTD
22.	Frederick Wetekamm	Y	N	DOTD
23.	Lyle LeBlanc	Y	N	DOTD
24.	Terri Hammack	Y	N	DOTD
25.	Carmen Hernandez	Y	Y	DOTD
26.	John Lellig	Y	Y	ERP
	District 02			Via Video Conference
1.	Paul Delaune	Y	Y	DOTD
2.	James Jarrell	Y	Y	DOTD

3.	Richard Baudier	Y	Y	DOTD
4.	Samuel Paternostro	Y	Y	DOTD
5.	Clyde Davis	Y	Y	DOTD
6.	Scott Rome	Y	Y	DOTD
7.	Chris Morvant	Y	Y	DOTD
	District 03			Via Video Conference
1.	Keith Briely	Y	Y	DOTD
2.	Pat Deroselle	Y	Y	DOTD
3.	David Ledoux	Y	Y	DOTD
4.	Ray Fontenot	Y	Y	DOTD
	District 04			Via Video Conference
1.	James Pixley	Y	Y	DOTD
2.	Kerry Williams	Y	Y	DOTD
3.	Ken Roberts	Y	Y	DOTD
4.	Andy Long	Y	Y	DOTD
	District 08			Via Video Conference
1.	Doug Glenn	Y	Y	DOTD
2.	Kent Hardin	Y	Y	DOTD
3.	Robert Martin	Y	Y	DOTD
4.	Thelma Woodward	Y	Y	DOTD
	District 62			Via Video Conference
1.	Joe Bowling	Y	Y	DOTD
2.	Roland Maurin	Y	Y	DOTD
3.	Wesley Danna	Y	Y	DOTD

<i>Agenda Item and Notes</i>	<i>Owner(s)</i>	<i>Action Items & Assignments</i>	<i>Comments / Follow-up</i>
1. Logistics, Ground Rules, & Introduction	Mark Suarez	• None	
2. Project Timeline	Mark Suarez	• None	
3. Workshop Objectives	Mark Suarez	• None	
4. Business Process Review	Charles Pilson	• See action items & assignments below.	
<ul style="list-style-type: none"> • Glossary • Concepts & functionality • Leading practices • Enterprise readiness 			

challenges

5. Action Items

Person Assigned	Action Item	Additional Comments/Notes
Charles Pilson	1. See list of "requests" in notes	
Mark Suarez	2. Check with traffic regarding mile realignment	
Charles Pilson / Shanker Shrestha	3. Add more Characters to "Remark" field	
Charles Pilson / Shanker Shrestha	4. Look into Automatic Creation of New Rows for Equipment & Materials	
Charles Pilson / Shanker Shrestha	5. Retain Foreman in some form - (a)Type in ISIS # (b)Make required field	
Mark Suarez / Charles Pilson	6. Talk with Traffic Guys regarding Mile Points	
Mark Suarez / Charles Pilson	7. Setup Rules to check that WBS is filled in for certain Activity Code	Will need rules (i.e. Activities). Plus, this probably won't be 'dynamic' (in the sense that it will have to be hard coded and if the rules change – then the groovy code will have to be changed.)
Mark Suarez / Charles Pilson	8. Look at Function Codes that require Accomplishment & Frequency and see if we can remove Frequency 418 – Cutting & Burning Bumps 412 – Pot Hole Patching	
Mark Suarez	9. Get Legal Form (Cost & Distribution of Accident Repair Form)	
Mark Suarez / Charles Pilson	10. Decide whether to Create Alternate LRS based on Route Mile Pt and which will be the base LRS	
Mark Suarez / Charles Pilson	11. Get Database Schema from Cathy Sessums for Zword	
Mark Suarez / Charles Pilson	12. Review all the Dates (especially Inspection Date) at the bottom of Zword form and their purpose	
Mark Suarez	13. Set up meeting with Cathy Sessums for Zword fields {Current Options and where these are going into SAP}	Need to know where the data will go in SAP to determine whether we will need them or not.
Mark Suarez / Charles Pilson	14. Decide how to Handle Legacy Data (Talk with DOM/IT Guys)	

Discussion

Please create a sign in sheet and mail it to Mark Suarez or FAX to 225-379-1700. You can also email the attendee list to MarkSuarez@dotd.la.gov

Work Order Creation – work orders are the core of the maintenance management operation. Work requests are optional; work orders are not optional. This is where people and equipment are assigned to work orders.

Charles starts with a hierarchy of the concepts that have been discussed. Projects are the top of the hierarchy. WBS numbers are going to be SAP projects – big projects that you charge to will be WBS numbers that relate to SAP, but the SAP Project number is not required for Agile. A project is required in Agile; every work order will have a project attached to it. The next level down is a work order.

Reminder: Work requests are not required to create a work order. Also, remember that you can have a work request that never has a work order opened on it.

Day cards are the next level down. There are Labor Day cards, equipment day cards, and material day cards. When a work order is created in Agile, a work order shell will be created in SAP automatically. This is important for example for other areas of the business to tie information to the work order, for example, materials people to do a goods issue against a work order using SAP.

Work orders can be created from plans, preventative maintenance, work requests, service requests. They can be scheduled as well. The information that comes from work orders is used to look at level-of-service – to balance what is being spent and what is achieved for those dollars. Keep in mind, SAP will be capturing related information, such as costs but Agile will be where the work is recorded and planned.

Charles reviewed a straw-man process of scheduling a work order (refer to slides, #13). The important point is that the process will not force a user to use the process in the order presented. Charles stressed that the process is just capturing everything done, but maybe not in the order he is showing. WO are created: (1)to build an asset, (2)to schedule work, (3)for time entry. Slide 15 reviews other WO work flows to maximize the costs based on why the WO was created. The point is that there is more than one way of creating a WO in Agile.

Are there any superintendents that create work orders (besides a clerk)? The answer appears to be 'Yes'; there are a number of foremen and superintendents that will need to be able to create WOs.

What kind of reporting that people do now? Carmen: can do a report by function number (Work order header report: pick month, dist, gang, function, parish, etc). Charles would like to know what are the most important things on this?

Function codes will become five digits. The proposed function codes were sent out to DAs and ADAs to review.

Action Item for the Group: Start making a list of the reports used daily, frequently, infrequently. Also think about reports that you would like to have that you don't have now. Sketch them out, identify the information you need.

Requests:

- Daily Work Report: more characters in the remarks on the Z-word form
- More user friendly – the ability to use keyboard, the current system is mouse only
- In the current system, the date has be changed on each screen

Carmen will walk the ERP team through the form and go over the problems and issues.

Mark reminds the group that the Sandbox is not configured for DOTD yet – you are just getting a feel for the software and how it works. Also remember that the screens will be customized for users, so that users will have access to only what they need. What a User sees depends on what role he logs into the Sandbox. DOTD will be customizing the system, naming the tabs, fields, etc. so it is important to keep that in mind.

Entry of the foreman will be required. The group would like the ISIS number to be a part of the name. Charles says that we can attach the ISIS number to the name for the drop down. If foreman is made a required field, then it must be assigned, which means that in the case where it might not be known who will do the work – someone has to be assigned. The name can always be changed later.

Route or control section log mile for the primary identifier of the work: all districts are using mile point (since logmile does not appear on the zword screen). The control section is also entered. The current system compares the control section to route. Mark said that latitude and longitude will be a part of the new system (if entered through the PDA). Currently, workers refer to a document to get the mile point. If a work area goes over two

different control sections, then another work order has to be created. (Agile will allow multiple locations for a work order.) Assets will be split up into control sections.

Keep in mind: on the SAP side – there is a GASB reporting issue. As a result of Katrina and Rita, the ability to recover roads that were impaired has become an important issue. Control section is probably what will be used for GASB reporting. Mark reiterated that the intention is to make this process easy, not cumbersome.

Route parish and charge parish – are they ever different? The charge parish is where the crew is located; the route parish is where the work was done. District wide workers charge to a district wide number, statewide workers charge to a statewide number. Future systems: charge parish will probably become cost center. Then whichever gang that opened the work order, then the costs will be charged to that gang. Charles mentioned that the charge parish will likely map to Cost Center in SAP in which case this will end up being based on which Gang is logged in to Agile when the work order is created.

Structure number or structure ID? If the log mile is kept in the structure number, then the structure number is changed if there is a change in the log mile. The structure ID is a one digit code. The Recall number (which is a unique identifier) was also discussed.

61 (district) xx (parish) 45012 (control section) 0000 (log mile) 1(ID)
(14 characters)

In Agile: a location and an asset are attached to work orders.

Mark mentioned having a meeting with all the clerks from all the districts.
He assured them this will help to make there jobs easier and not abolish them.

Equipment ID: 6 digit number assigned to it by Dotd.
Will be using SAP system for this. Will discuss more later.

Acc/Storm/Vand Ind: use letters. (A, S, or V) Not really using right now. They use the project # to determine what it is about. Now they are being told to use it.

Identification Code: 2 digit code to identify the work being done.

RampFront: Indicate part of the interstate. This is a one digit code R or F.
District uses the function and would like to keep. Charles pointed out that in the future when the GIS data is more detailed, the frontage road or ramp will be looked up specifically as a location or asset.

Priority: Use letters (R or I). Districts use this function and want to keep.

Reimb. Category: It pops up automatically based on route and milepoints.

Status: that is a calculation if you use this work order more than once

Accomplishment:

Frequency: Could do with out. Only applicable to a couple of Activity codes. We should investigate changing the activity code to have different accomplishment units (see associated action item).

System and Route System: These are both numbers to indentify what type of roadway is being worked on (e.g. 1 – Interstate; 2 – Primary; 3 – Secondary; 4 – Farm to Market). However, they differ sometimes when the 'System' is designated as 6 - Overhead. This will need further investigation to see where this is going to go in SAP.

All of the following are not required fields:

Sch. Date: When it was created

End Date: When it ends

Inspection Date: Construction Part, (don't think its being used) was told this was the date they did the work. (This is not clear what this is being used for)

Complaint: Y or N. District folks would like to keep but Charles pointed out that the Work Request number will replace this.

Estimated Qty.: (doesn't fill out)

Inspector: not being used

Charles: Went over how Sandbox – AgileAssets works

Contracts: mowing, litter pick up, guard rails,
Mowing contracts requires: agreement with parish and DOTD to mow and litter pick up. Other is I-10 landscape. Companies do the work upon DOTD request (when and where). This is requested by letter. This arrangement varies between districts to districts.

Contract should already have project number. Each district has a separate contract.

Cost and distribution of repairs guardrails, sand of oil spill, wreck or accident (in house)
This form is used separately for each gang. (see associated action item re obtaining a copy of the form)
Contract has a bucket of money – receive all invoices for the month then send to accounting to pay.
Bundle with accident report and send to legal section.

Mowing and litter pickup isn't recorded by how much litter was picked up when by contract. DOTD works with Beautifications to make sure work has been done or vise versa.
The prison is another contract DOTD has with mowing and littering. The amount is recorded on how much was picked up at the location reported. This is done on work order. (475 Activity code)

Boyd: Demonstrated how to create a work order with the hand held PDA.

Mark – confirmed next week Tuesday, meeting at 8:30. Also requested they send the rosters for today's meeting.

FRICE – W (Forms, Reports, Interfaces, Conversions, Enhancements, Workflows)

1. Possible WO Form print outs to take into Field
2. WO header report (this will move to Reports blueprint)
3. Interface to send WO Inserts & Updates to SAP (to Create/Update "Shell" SAP WO s)

Key Decisions

1. None.

Integration Points

1. WO Inserts & Updates will be sent to SAP thorough Interface.

Organizational Impact

1. New WO Screens will cause some Org Impact
2. PDA will cause Paradigm Shift/Change

Parking Lot

1. Structure #
DI.PA.CONTR.LOGM.I DI=District; PA=Parish; CONTR=Control Section; LOGM =Log Mile; I= ID
XX-XX-XXXX-XXXX-X